

## **CHAPTER 4**

# **REVIEW AND CORRECTION**

The StEPS Review and Correction system allows you to:

- View and edit item data for an ID in a specified survey and stat period
- View and edit control information (i.e., name, address, phone, contact) for an ID
- Create ID subsets of survey data to review
- View different versions of item data (reported, edited, adjusted, weighted-adjusted)
- View item totals
- Add item records to an ID
- View and edit respondent text for an ID
- View and add notes for an ID
- View item data in a matrix format
- Perform ID status changes (add, delete, ghost, restore, merge, reserve)
- View the collection history for an ID (i.e, check-in date, mail-out date)
- View audit trails for changes made to item and control data
- View/edit historical data for an ID

You may view and edit item and control data for the survey and stat period specified in USER SETUP in a variety of ways, using a number of different screens. Most of these screens can be accessed via the GOTO pmenu located in the Review and Correction Main Menu, although several (i.e., Notes, Add Item, Collection History) can only be accessed from within select

Review and Correction screens. For example, the Add Item screen can only be accessed from the ID by Item and the ID Matrix screens.

GOTO pmenus are located on all of the Review and Correction screens, giving you access to the other screens within the module. Function keys have also been assigned to many of the screens, making screen selection quick and easy, eliminating the need to use the p-menus. (See Section 4.1.3 for more information on screen access, including a list of function keys.)

The Review and Correction system uses a “selection set” concept. A selection set is simply a list of IDs in a survey. You can create this list (or “selection set”) by entering where clauses or using the query module to subset the IDs in the survey. For example, rather than processing all IDs (which could be very large), you may want to review only those cases that have been checked-in, only cases that are located in a specific state, or only those cases classified in a specific SIC.

You must create/specify a selection set in the Review and Correction Main Menu screen. Once a selection set has been specified, all other screens in the Review and Correction system will work from that selection set. This does not mean that you cannot access an ID outside of the selection set. It does mean, however, that the ID pick lists provided in the different review and correction screens will only display those IDs meeting the criteria specified when creating the selection set. If you use the function keys or Utilities options to access the “next” or “previous” ID, you will be accessing the next or previous ID in the selection set, not in the survey.

Screens available in the Review and Correction system include the following:

<b>Review and Correction Main Menu</b>	Create/specify a selection set; select up to 2 additional stat periods of data for review; access the Review and Correction screens; unlock ID's
<b>ID by Item</b>	View and correct item data for a specified ID (data is displayed in ID by Item order)
<b>ID by Item 2</b>	View and correct item data for a specified ID (similar to ID by Item; current-to-prior period ratios are displayed)
<b>ID Matrix</b>	View and correct item data for a specified ID (data is displayed in a matrix (columns/rows) format); view different versions of the data: reported, edited, adjusted, weighted-adjusted
<b>Item by ID</b>	View individual ID data for a specified item (data is displayed in Item by ID order)
<b>Respondent Text</b>	View and correct respondent text for a specified ID

<b>Historical Data</b>	View and edit historical data by creating a data table (at the ID level) of select items and stat periods; view different versions of the data: reported, edited, adjusted, weighted-adjusted
<b>Control Information</b>	Edit and view survey control information (i.e., name, address, phone, contact, SIC, weight)
<b>Status Changes</b>	Add, delete, ghost, merge, reserve, restore case IDs to the survey panel
<b>Notes</b>	Add and delete notes for an ID
<b>Add Item</b>	Add an item record to the ID item file (this screen is only accessible from the ID by Item and ID Matrix screens)
<b>Collection History</b>	View dates for survey collection activities (i.e., mailout, follow-up)
<b>Audit Trail</b>	View changes that have been made to an ID's item or control record (The audit trail lists the old and new value of the updated item, identifies who made the last change, and indicates the date/time that the change took place.)
<b>Mail Group</b>	Set up a centralized mailing address for a group of IDs

## 4.1 REVIEW AND CORRECTION MAIN MENU

### Introduction

The Review and Correction Main Menu allows you to:

- Choose 2 stat periods (in addition to the default) of data to review
- Create/specify a selection set
- Access the Review and Correction screens
- Unlock IDs
- Select a different survey to review (by providing direct access to the Survey Selection screen)

### Accessing the Screen

Click on the REVIEW AND CORRECTION button from the StEPS Main Menu to access the Review and Correction Main Menu screen:

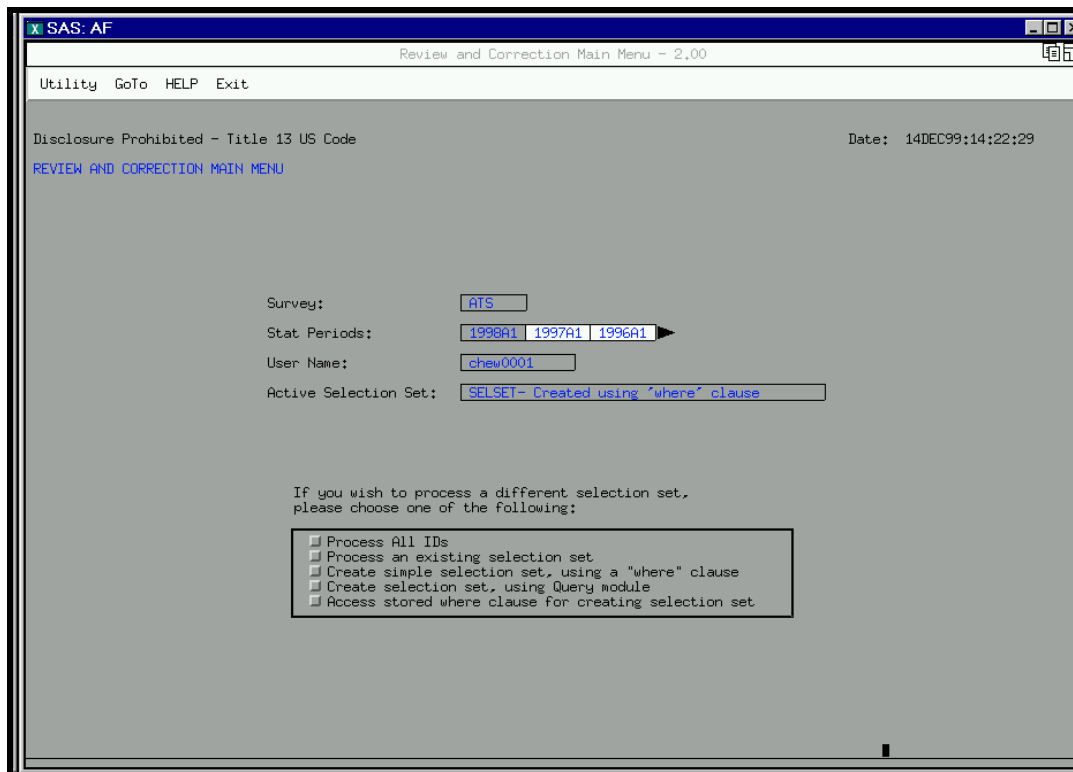


Figure 4.1 Review and Correction Main Menu

## Screen Features

The following 4 fields are for display purposes only and are not correctable:

### SURVEY

- ! The survey default, previously specified in the Survey Selection screen is displayed.
- ! This field is not correctable. You may only change surveys in the Survey Selection screen. (Access the Survey Selection screen by choosing the “Change surveys” option from the UTILITIES p-menu, or pressing ‘Ctrl-D’.)
- ! Click on the Survey field to display the survey title.

## STAT PERIOD

- ! The default statistical period, previously specified in the Survey Selection screen, is displayed in the first Stat Period field. This field is not correctable. You may only change the default stat period in the Survey Selection screen. (Access the Survey Selection screen by choosing the “Change surveys” option from the UTILITIES p-menu, or pressing ‘Ctrl-D’.)
  - ! The second and third stat period fields, which allow you to specify additional stat periods of data for review, are correctable and are defined further in Section 4.1.1, below.
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## USER NAME

Your user name is displayed in the User Name field.

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## ACTIVE SELECTION SET

- ! The active selection set currently being processed, is displayed. (How to create/specify a selection set is further defined in Section 4.1.2, below.)
- ! You must specify a selection set before you can process survey data.

### 4.1.1 CHOOSE ADDITIONAL STAT PERIODS OF DATA TO REVIEW

In addition to the default stat period (specified in the first stat period field), you may select up to 2 additional stat periods of data for review. Specify additional stat periods by clicking on the arrow in the stat period field to bring up a pick list of available statistical periods:

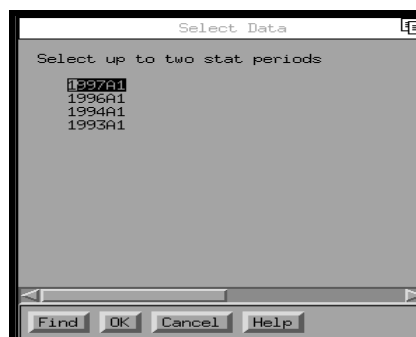


Figure 4.1.1 Stat Period Selection Screen

1. Available stat periods are listed in descending order.
2. Click on the stat period(s) you want to select and then click on “OK”.

The stat period(s) selected from the pick list will be displayed on the Review and Correction Main Menu in descending order, regardless of the order in which they were chosen. They will become the default prior stat periods for the Review and Correction module.

#### **4.1.2 CREATE/SPECIFY A SELECTION SET**

StEPS gives you the option of processing all IDs or a subset of IDs (selection set) in a survey. The term “selection set” simply refers to a list of IDs. Rather than processing all IDs in a survey (which could be very large), you may want to review only those cases that have been checked-in, only cases that are located in a specific state, or only those cases classified in a specific SIC. By creating a selection set, you can limit the number of cases to access for review.

You must specify the selection set you want to process by choosing one of the following options:

1. Process all IDs
2. Process an existing selection set
3. Create simple selection set, using a “where clause”
4. Create selection set, using the Query module
5. Access stored where clause for creating selection set

When a selection set has been created or retrieved, a message will display in the upper left corner of the screen, indicating the number of cases in the selection set. Selection sets are sorted in ascending ID order.

#### **OPTION 1: PROCESS ALL IDS**

- ! Creates a selection set including all case ID’s (up to 10,000) for the survey specified.
- ! Will automatically be assigned a filename of SELSET....SELSET5 (by the program).
- ! Will automatically be assigned a description of, “All (up to 10,000) IDs in selection set” (by the program).

**NOTE:** It is unlikely that you will want to create a selection set of “ALL IDS” if the total number of cases in the survey exceeds 10,000. Since the “Process all IDs” option only pulls up the 1<sup>st</sup> 10,000 cases, you will have to create a selection set using the simple where clause or the Query module to include all cases in the survey.

#### **OPTION 2: PROCESS AN EXISTING SELECTION SET**

- ! If you choose Option 2, a pick list of previously created selection sets will display:

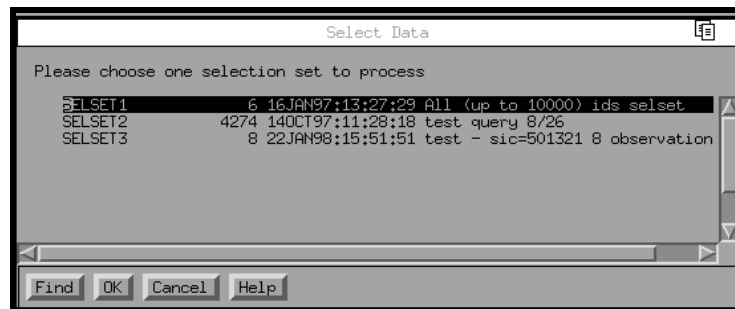


Figure 4.1.2a Process an Existing Selection Set Screen



Column 1:	Name of selection set (automatically assigned by program at time of creation)
Column 2:	# of observations in the selection set
Column 3:	Date/time selection set was created
Column 4:	Description of selection set (entered by you when selection set was first created)

- ! Choose a selection set by clicking on it with the mouse.
- ! The name (SELSET.....SELSET5) and the description of the selection set chosen, will appear in the “Active selection set” field on the Review and Correction Main Menu. The number of observations in the selection set will be displayed in the upper left corner of the screen.

### OPTION 3: CREATE A SIMPLE SELECTION SET, USING A “WHERE CLAUSE”

- ! You can create a selection set using a simple “where clause” (i.e., “where SIC = 3721”). Choosing this option will access the following StEPS standard “where clause” screen:

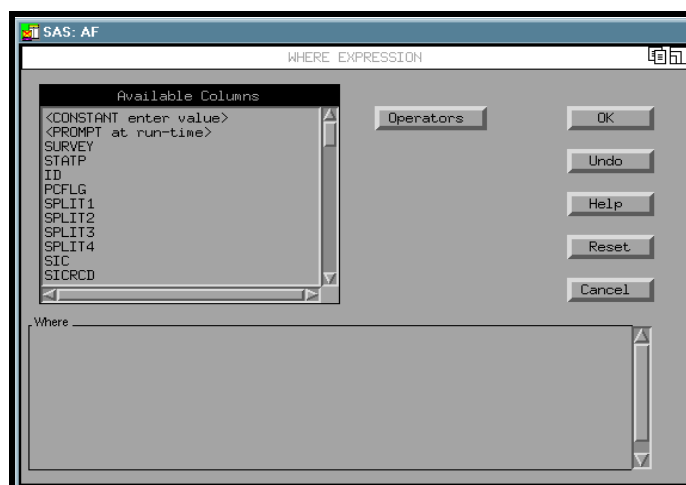


Figure 4.1.2b StEPS Standard Where Clause Screen

- ! To create a “where clause”, you must select a variable (from the “Available Columns” box), choose an operator, and select a constant. For example, if you wanted to create a selection set of IDs where “SIC = 50321” (‘SIC’ is the variable, ‘EQ’ is the operator, and ‘50321’ is the constant), you would do the following:
  1. Select “SIC” from the “Available Columns” box
  2. Click on “Operators” to bring up a pick list of available operators (i.e., EQ, NE, GT, GE, LT, LE).

3. Click on "EQ" (equal to)
4. Click on "<CONSTANT enter value>" from the "Available Columns" box.
5. Another box will display. Enter the constant "50321" in the first box and press <ENTER> OR select "LOOKUP" to display a pick list of valid SIC's, from which to choose.

**NOTE:** Click on the HELP button to access help information on using this screen.

You may choose a single variable or a combination of variables and operators to build your where clause. The variables listed in the "Available Columns" box are from the Master Control File (CT) and the Statistical Period Control (C1) file.

The dates listed in "LOOKUP" for control variables with date formats (i.e., check-in, extension) are displayed in a SAS format. The SAS format is for programming purposes and is not a readable format. To enter a date in the StEPS standard where clause screen for such variables, select the "CONSTANT" option and enter a date using the following format: 'DdmonthYY'd (where 'DD' = day and 'YY' = year)  
Example: January 13, 1999 = '13jan99'd)

- !** As you build your "where clause", it will be displayed in the "Where" box, at the bottom of the screen. Choose a button from the right side of the screen to do the following:

OK	Submit the where clause and create the selection set
UNDO	Remove the last variable, operator, or constant from the where clause
HELP	Access HELP information on using this screen
RESET	Clear your current where clause
CANCEL	Do not submit the where clause; return to the Review and Correction Main Menu

- !** Saving your selection set

1. When you create a selection set, it will be saved as a temporary data set, unless you choose to make it permanent. Temporary data sets are only active for the current session and will be deleted when you create or access a different selection set to process.
2. StEPS will prompt you to save your newly created selection set to a permanent file.

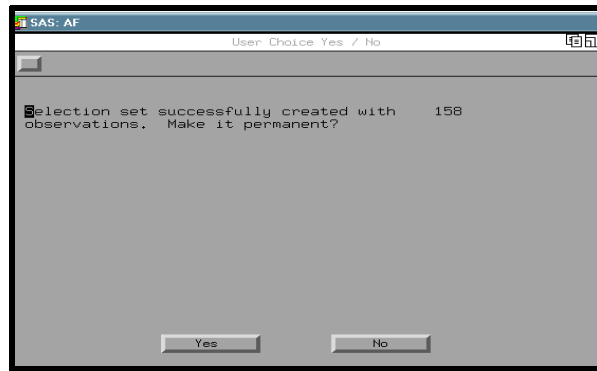


Figure 4.1.2c Selection Set Confirmation Screen

- ! Click on “Yes” to save the selection set to a permanent file.
- ! Click on “No” if you do not want to save the selection set to a permanent file.

3. If you choose to save the selection set, it will automatically be assigned a filename of SELSET.....SELSET5 by the program. You will be prompted to enter a description for it.

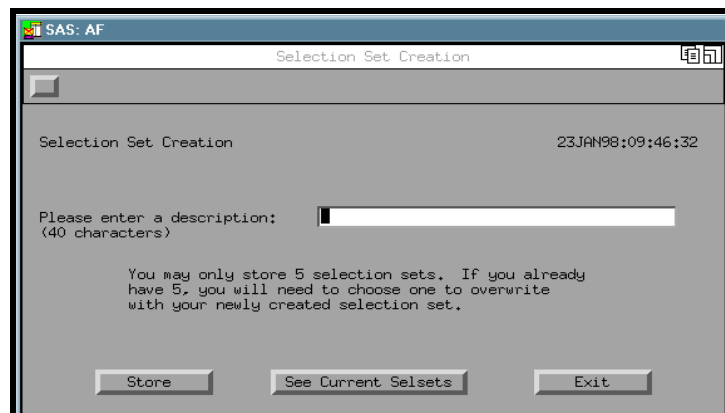


Figure 4.1.2d Selection Set Description Screen

4. Enter a description. Descriptions cannot exceed 40 characters.
5. You may only store up to 5 selection sets in StEPS. If you already have 5 selection sets and wish to save another, StEPS will prompt you to overwrite an existing one.
6. If you choose NOT to create a permanent file, the temporary data set will automatically be assigned a description, as well as a filename. The filename will be SELSET and the description will be, “Created using ‘where’ clause”.

## ! Saving your where clause

You may save the where clause used to create the selection set. The where clause you have just entered will be displayed in the text box at the bottom of the Review and Correction Main menu screen. Click on the down arrow, to the right of the text box, to display a list of “where clause” options. Click on the “Save/new” option to save the where clause.

Where clauses will automatically be saved in the SASUSER.WHERE catalog. This means that you may access any of your saved where clauses, regardless of which survey you are currently processing. The entire filename, “SASUSER.WHERE.ename.SOURCE” will automatically be assigned by the program, where “ename” is the 1<sup>st</sup> six characters of the first control variable in the where clause, followed by a 2-digit sequence number.

Example:

```
Where clause: SICRCD GT '3140'  
Ename:      SICRCD01
```

The first 40 characters of the where clause will be used as the description for the catalog entry.

### **OPTION 4: CREATE SELECTION SET, USING THE QUERY MODULE**

If you want to create a selection set using a more complicated query, you can access the Query module, instead of using the “where clause” option. (See Chapter 5, Tools, for information on using the Query module.) As with the “where clause” option, you will be prompted to save your newly created selection set to a permanent file. If you choose not to make the selection set permanent, the temporary data set will be assigned the name of “SELSET” and the description associated with it will be, “Created from query.”

### **OPTION 5: ACCESS STORED WHERE CLAUSE FOR CREATING SELECTION SET**

If you create a selection set using the “simple where clause option” (option #3), you may save the query used to create it. The “where clause” (or query) will be stored at the user-level in the catalog SASUSER.WHERE. This means that you will have access to all of your saved where clauses, regardless of which survey you are currently processing.

If you wish to create a selection set using one of these saved “where clauses”, click on option #5. A pick list of all existing where clauses will display. The list will include the name of the where clause, the description of the where clause, and the date that the where clause was created or last updated. Highlight an existing where clause to select it. The

where clause will display in a text box at the bottom of the Review and Correction Main Menu screen. You may edit the where clause within this text box. (Note: When editing a where clause, you must use single quotes. If you use double quotes, an error message will display.)

Click on the “down” arrow, to the right of the text box, to see a list of available options:

<u>Option</u>	<u>Description</u>
1. Run	Run the query currently displayed in the text box to create a selection set.
2. Check syntax	Check the SAS syntax of the where clause currently displayed in the text box.
3. Save / new	Save the query, currently displayed in the text box, as a new file.
4. Save / replace	Save the query, currently displayed in the text box, by overwriting the original query.
5. Undo	Undo any changes made (to the query) in the text box.
6. Delete	Delete the query currently displayed in the text box.
7. Exit	Exit the “where clause options” menu.

#### **4.1.3 ACCESS THE REVIEW AND CORRECTION SCREENS**

Once you have chosen a selection set to process, you can access any one of the Review and Correction screens using the GOTO pmenu. See the Introduction to Chapter 4 (page 4-2), for a complete list of available Review and Correction screens and corresponding descriptions.

In lieu of using the GOTO pmenu to access some of the more common screens, you may also use the following function keys:

<b>Screen</b>	<b>Function Key</b>
Survey Selection	CTRL - D (only available in Review and Correction Main Menu screen)
ID by Item	CTRL - I
ID by Item2	CTRL - J
ID Matrix	CTRL - M
Item by ID	CTRL - T
Historical Data	CTRL - H

Control Information	CTRL - C
Status Changes	CTRL - S
Respondent Text	CTRL - R
Notes	CTRL - N
Mail Group	CTRL - G
Collection History	CTL - L

#### 4.1.4 UNLOCK IDS

StEPS does not allow 2 users to access the same ID at the same time. If you try to access an ID that is already held by another user, a message will display, informing you that the ID is locked and that you should try to access it again later. Sometimes, however, it is possible for an ID to be locked by the same user trying to access it. This can happen if the user had previously exited the system improperly or if the system crashed. In cases where an ID is locked under your own user name, you can unlock the ID by selecting the “Unlock my IDs” option from the UTILITIES pmenu.

You cannot unlock an ID held by another user, unless you have management privileges (MGMT = ‘P’). In cases where it is necessary to unlock all IDs in the survey, you can select the “Unlock all survey IDs” option from the UTILITIES pmenu, provided you have the proper privileges.

#### P-Menus

P-Menu	Options	Function
UTILITIES	Change Survey (CTRL - D) Unlock my IDs Unlock all survey IDs	Access Survey Selection screen Unlock your IDs only Unlock all IDs in survey (special privileges required)

P-Menu	Options	Function
GOTO	Control Data ▶ Survey Master Control File Control Information Status Changes Mai Group Audit Trail ▶ Control Audit by ID Control Audit by Date  Item Data ▶ ID by Item ID by Item2 ID Matrix Item by ID Historical Data Audit Trail ▶ Item Audit by ID Item Audit by Date  Respondent Text  Query	Access the Survey Master Control File screen Access Control Information screen Access Status Changes screen Access the Mail Group screen Access Control Audit by ID screen Access Control Audit by Date screen  Access ID by Item screen Access ID by Item2 screen Access ID Matrix screen Access Item by ID screen Access Historical Data screen Access Item Audit by ID screen Access Item Audit by Date screen  Access Respondent Text screen  Access Query module
HELP	Data Review and Correction Menu Help (F1)  Function Key Help WhoamI (F7)	Display HELP information on using the Review and Correction Main Menu screen Display list of function keys and descriptions Display user default and systems information
EXIT	StEPS Main Menu (Home) Exit (F3)	Return to StEPS Main Menu Exit to previous screen